

*Statewide Marketing, Education,  
and Outreach Workshop*

*January 12, 2017*



&

**DDB<sup>®</sup>**

**ENERGY  
UPGRADE  
*California*<sup>®</sup>**





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# *Agenda*

**Welcome: 9:30 — 9:45**

*Commissioner Carla Peterman*

**Today's Purpose: 9:45 — 10**

*Michael Shue, Executive Vice President, DDC*

**Research Findings to Date: 10 — 10:45**

*Matt Perry, Group Business Director, DDB Meghan Tetwiler, Brand Strategy Lead, DDB, Jackie Zima Multi-Cultural Strategy Lead*

**Break 10:45 — 11:00**

**Integration and Co-Branding with Program Administrators: 11:00 — 12:30**

*Rory Cox, Analyst, CPUC Energy Division, Energy Efficiency Branch*

**Lunch Break 12:30 — 2:00**

**Structured Discussion of ME&O Five Year Plan: 2:00 — 4:00**

*Michael Shue, Executive Vice President, DDC*

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# *Commissioner Peterman*

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# *Today's Purpose*

“The Commission adopted a governance structure for the statewide ME&O that was intended to provide for strong oversight and contract management by the Commission and the California Energy Commission (CEC), while allowing for collaboration, input, and advice from the utilities and other stakeholders.”

Today, our focus is on collaboration and discussion as we review the first draft of the Five-Year ME&O Roadmap.

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# *Goal of ME&O Plan*

After the passage of SB 350, which aims to reduce greenhouse gas emissions (GHG) and create a cleaner energy environment in California, the California Public Utilities Commission (CPUC) recognized the need and value of reigniting a statewide marketing, education and outreach (SW ME&O) effort to change energy consumption behavior among all Californians.

# Two Pillars from The Decision

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13.

As part of the collaborative process directed by Decision 16-03-029, the statewide implementer and other stakeholders shall also prepare final deliverables including (1) revised strategies to implement the adopted short- and long-term goals of the program; (2) revised measurable objectives to determine success in implementing the strategies; and (3) specific metrics to be used to evaluate the progress and success of the program.

**Task 1: Planning**

A. 5-year Marketing Education & Outreach (“ME&O”) Strategic Roadmap (“Roadmap”) Contractor shall work with Commission staff to lead a process to create a 5-year ME&O roadmap for Energy Upgrade California and the Program Administrators (PAs). This will take into account of the IOU’s business plans for energy efficiency, as well as (but not limited to) marketing strategies for customer-owned generation, demand response, rate structures, water/energy nexus, electric vehicles, the California Climate Credit, low income programs, and behavior change. This plan will outline long term goals, metrics, and strategies for ME&O, and should explain how these strategies will lead to the greenhouse gas reduction and energy efficiency goals in CA Senate Bill 350. The Roadmap should state the roles and responsibilities of all participants.

# Integration

 <i>Energy Management Technologies</i>	<b>Mandated by AB793</b> <ul style="list-style-type: none"><li>• <b>Smart meter enabled feedback of energy use and costs</b></li><li>• <b>Range in price from free apps to \$700 thermostats</b></li><li>• <b>Smart thermostats have potential to save 10 – 15%</b></li><li>• <b>Can be effective tool to reduce plug loads</b></li><li>• <b>Staff recommendation: High priority</b></li></ul>	DDB:
		Stakeholder:
 <i>Time of Use Rates</i>	<b>Key piece of Residential Rate Reform, which also includes reducing number of rates</b> <ul style="list-style-type: none"><li>• <b>Will likely have bill impacts on lower energy users</b></li><li>• <b>Default Time of Use pilots will begin in 2018</b></li><li>• <b>Rates should encourage</b></li></ul>	DDB:
		Stakeholder:
 <i>Critical Peak Pricing/Smart Rate</i>	<ul style="list-style-type: none"><li>• <b>Available for residential and commercial customers</b></li><li>• <b>Voluntary program – customers get a slight reduction in their daily rate, charged a premium for energy use during peak times in the summer</b></li><li>• <b>Limited to 15 days/year</b></li><li>• <b>Staff recommendation: High priority</b></li></ul>	DDB:
		Stakeholder:
 <i>Electric Vehicles</i>	<b>Goal: 1.5 Million Zero Emission Vehicles on the Road in CA by 2025.</b> <ul style="list-style-type: none"><li>• <b>Utilities have special rates for home vehicle charging</b></li><li>• <b>High priority program for state</b></li><li>• <b>Considerations: IOU and Vehicle marketing</b></li><li>• <b>Staff recommendation: High priority, but better to take an educational approach than trying to sell cars</b></li></ul>	DDB:
		Stakeholder:
 <i>Climate Credit</i>	<ul style="list-style-type: none"><li>• <b>Semi-annual credit on the bills of all IOU ratepayers, in April and October</b></li><li>• <b>Ranges from \$20 to \$50</b></li><li>• <b>Utilities required to use neutral language in marketing; can't be used for green marketing</b></li><li>• <b>Previous marketing was “30 items under</b></li></ul>	DDB:
		Stakeholder:
 <i>Lighting</i>	<ul style="list-style-type: none"><li>• <b>LEDs save 50% energy over incandescent</b></li><li>• <b>Should prioritize promotion of high-quality LEDs</b></li><li>• <b>Should have standard higher than Energy Star</b></li></ul>	DDB:
		Stakeholder:
 <i>Save Water</i>	<ul style="list-style-type: none"><li>• <b>Extreme drought has made water conservation a state priority</b></li><li>• <b>Consideration: Governor's office asked EUC to prioritize water saving messaging</b></li><li>• <b>In 2015, Californian urban customers reduced water consumption by 20%</b></li><li>• <b>While water supply has improved in the last year, important to keep up water conservation messaging</b></li><li>• <b>Staff recommendation: High priority.</b></li></ul>	DDB:
		Stakeholder:
 <i>Other Programs</i>	<ul style="list-style-type: none"><li>• <b>Distributed generation/rooftop solar</b></li><li>• <b>AC Cycling program</b></li><li>• <b>Energy Savings Assistance Program</b></li><li>• <b>CA Alternative Rates for Energy</b></li><li>• <b>HVAC</b></li><li>• <b>Appliances</b></li></ul>	DDB:
		Stakeholder:

How We Got Here

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Five-Year Road Map

Research

*Discussion*

*Feedback*

Collaboration

Outline

*Workshops*

*Inputs*



# *Integration and Co-Branding with Program Administrators*

# Implementing Integration

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*Collaboration is critical to the success of the SW ME&O campaign in delivering targeted, complementary communications to all audiences. Successful integration will occur through:*

## **Promotion and Implementation of Products, Programs and Services**

Showcasing energy management/efficiency tools (for example, encouraging “energy smart” purchases at point of sale) available to Californians’ through their energy provider or third parties will reinforce the campaign brand.

## **Streamlining of the Lead Generation Process**

Create a process in coordination with IOUs, CCAs and RENs to deliver leads via the technological resources the Energy Upgrade CA program and IOUS, CCAs and RENs have available. The SW ME&O campaign will prime the marketplace for lead generation through digital integration and co-branding opportunities, with specific engagement methods outlined in the Joint Action Plans.

## **Execution of Tactical Co-branding Opportunities**

Cross promotion in marketing efforts (such as including information about the Energy Upgrade CA in regular stakeholder newsletters or cobranding the Home Upgrade program) will establish credibility for both the Energy Upgrade CA program and reinforce the value of the energy provider

# Qualitative Research

What we'll cover....

- *Research role & multi-phased approach*
- *Key themes from the field*
- *Implications for EUC and our 5 year plan*

# Role of multi-phased, research approach to understand all Californians

*Build a solid five year plan, informed by insight.*

*Qualitative: In-Depth Interviews*

DDB to lead

*Stakeholder  
Interviews with  
PA partners*

*What's working?  
What can be enhanced?  
What should be eliminated?*

*Qualitative: In-Depth Interviews*

DDB to lead

*Roundtable  
discussions with  
influencers and  
community leaders*

Particular attention will be paid to influencers in California who are framing the debate at the state, national, and in some cases global level on climate change

*Qualitative: Creative Fieldwork*

DDB to lead

*Creative Gut Check  
& In-Home  
Ethnographies  
with Californians*

to understand how to optimize creative ideas and execution and maximize the campaign's resonance and power.

*Quantitative: Segmentation*

DDB to lead

*Segmentation and  
Brand Tracking  
Hybrid Study*

to determine the optimal targets by identifying consumer mindsets, needs and behaviors as well as volume/worth of segments with most potential for change.

*We're Here*



Ultimately, we need to learn how to most effectively connect with everyone in a meaningful and personal way.



# Creative Fieldwork

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*Our qualitative objectives were two-fold.*

## VALIDATE RESONANCE

Validate that the *Power of One* platform resonates amongst all Californians and understand the longterm strength and potential of the idea.



## MAXIMIZE IMPACT

Uncover insight driving how we build upon and maximize power of existing executions and inspire new and more ways to motivate and activate our diverse target to become engaged energy stewards and smart energy managers.

# Methodology: Total Market Approach

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## Focus Groups:

- 6 Groups across 3 Markets (SF, Fresno, LA)
- Participants: Both Ends of the Energy Conscious Mindsets
  - Aware and Active
  - Not Aware and Not Active

*“I’m aware of energy issues and am actively taking action to make my home/business more energy efficient.”*

*“I am not particularly aware of energy issues nor do I know where to begin making my home/business more energy efficient.”*

## Ethnographic Interviews (in homes/in businesses)

- 10 In-depth interviews in homes, businesses
- Mix of: renters, owners, small business owners

*\*We completed Hispanic in-homes in Spanish with Spanish Speakers and Bilingual Hispanic Small Business.*



# Our Journey

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*We covered a lot of ground.*

Starting in Northern California, we worked our way south making the following stops:

1. Bay Area (*groups and in homes/in business*)
2. Redding, CA (*in homes*)
3. Fresno, CA (*groups, in homes*)
4. Los Angeles (*groups, in homes, in business*)





# Our Journey

*We covered a lot of ground.*

**We set out to gain deeper understanding of the following:**

- Current level of awareness and knowledge
- Underlying beliefs and attitudes
- Current motivations and actions
- Trusted sources of information
- How to maximize *Power of One* campaign





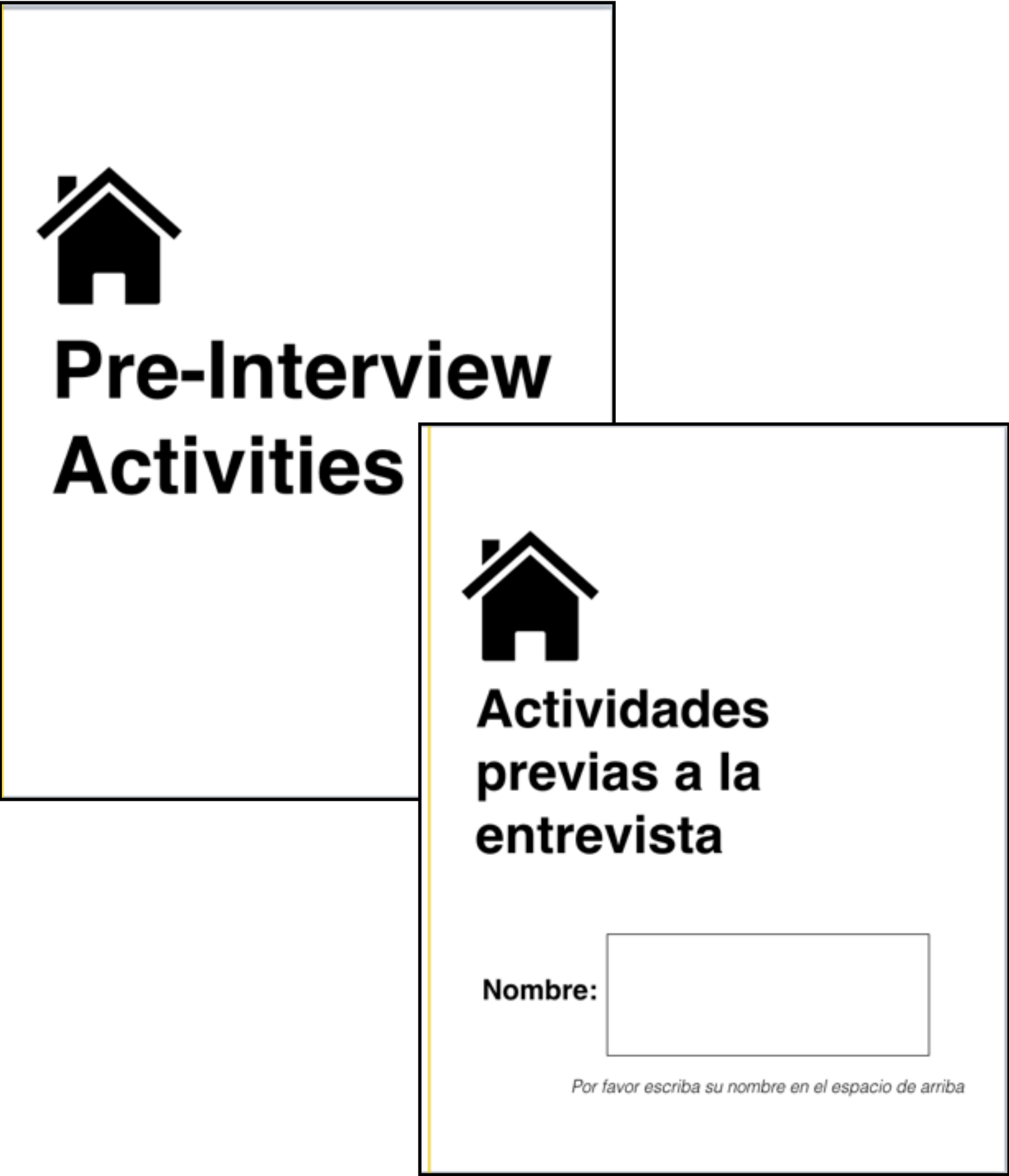
# Our Journey

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*How we got people to open up.*

**We utilized:**

- Homework/prep work
- \_\_\_\_\_ techniques
- Projective exercises
- Consequences mapping exercises
- Linguistic explorations



Activity 3:  
**Do One “Green” Thing A Day**

*Every day leading up to our meeting, please do at least ONE “energy efficient” thing everyday leading up to our session.*

- ☒ Turn off a light in a room you normally wouldn't
- ☒ Adjust your thermostat one degree cooler than you usually do
- ☒ Keep curtains and blinds closed at night to keep cold air out, but open them during the day to let the sun warm the room.
- ☒ Unplug your appliances when you are not using them.
- ☒ Replace a light bulb with an energy efficient one
- ☒ Wash your laundry using cold water.
- ☒ Hang dry laundry vs. tumble dryer.
- ☒ Run the dishwasher only with full loads, and use the air-dry cycle.
- ☒ Change or clean your furnace filter.
- ☒ Use a smart meter to monitor daily energy usage.

*Please check all the things you did from the list above.*



- ☒ Take a five minute shower or less.
- ☒ Air dry your hair (no blow drying)
- ☒ Unplug your cell phone charger when it isn't in use.
- ☐ Other: (please specify)
- ☐ TURNING OFF LIGHTS

*Please check all the things you did from the list above.*

*In the space below write a sentence or two about your experiences.  
What was it like to do something new? What was hardest thing?  
What was the easiest? Did you have to really think about it?*

LEARNING A NEW HABIT IS A MATTER OF PRACTICE. EVEN WHEN YOU DONT FEEL LIKE IT YOU MUST REMAIN COMMITED.



## Activity 1:

### A Day in Your Life

One day before our session, complete a “diary” of your media behaviors — writing down a few highlights from your day.

Did you watch TV? yes ☒ no ☐

If so, what did you watch?

For how long?

Did you listen to the radio? yes ☒ no ☐

What channel/platform/show?

For how long?

Did you read anything offline? yes ☒ no ☐

What did you read?

Where did you read it?

Did you read anything online? yes ☒ no ☐

What did you read?

Where did you read it?

Did you spend time on social

networking sites?

If so, what sites?

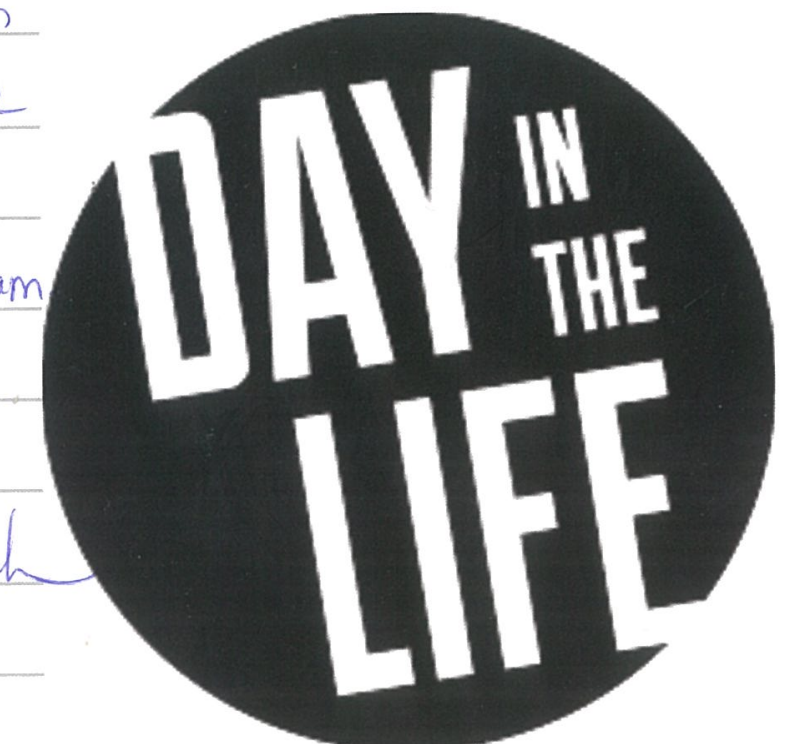
Did you post/share content?

Did you like others content?

Did you post comments?

**In the space below please write a BRIEF overview of your day.**  
When did your day begin? What did you do in the afternoon? What did you do in the evening? When did your day end?

My day starts at about 4:30am  
I check my email and facebook, take  
my shower, wake my mini adults up  
and leave for work at about 6:15-6:30am  
I am at work until about 8pm.  
I then travel back home, check in  
with my kids, do homework, eat, watch  
tv and go to bed.





## Activity 2: Goal Setting & Achieving

Please list a goal you have set and achieved on the sticky note. Then, write a short paragraph describing a time you successfully made a positive change in your life.



### What was your goal?

My goal is to get my Bachelor of Science degree in dietetics.

### How did you achieve your goal?

I started by talking to a counselor at Santa Rosa Jr. College to see what it would take to get my degree. I would get an AA from Santa Rosa Jr. College so that I could transfer to San Francisco State University. I would have to start with the basics and spend 3 1/2 yrs. commuting to San Francisco. Yeah stubbornness!

**Be sure to describe:** Why you set this goal? Did you write it down did you share it with anyone to hold you accountable? How did you stay committed? What did it take? Did you have any help from others? Positive reinforcement? How did it feel to achieve the goal?

I took on this 6yr quest because I needed a change. I had been working in long term care running the kitchen, when I thought I would go to school to become a dietitian. I told everyone. I never wrote it down but I told everyone. I had help from my partner and friends. I got grants and scholarships. I think the fact that I was older helped me stay committed and I was just stubborn and determined to finish. It took me 6 yrs. but I got my BS in Dietetics. Getting my degree empowered me. Everything I've done in my life has made me stronger. It just added another skill set. I've always felt if you're unhappy change things. Always keep learning, have a vision and keep moving forward.

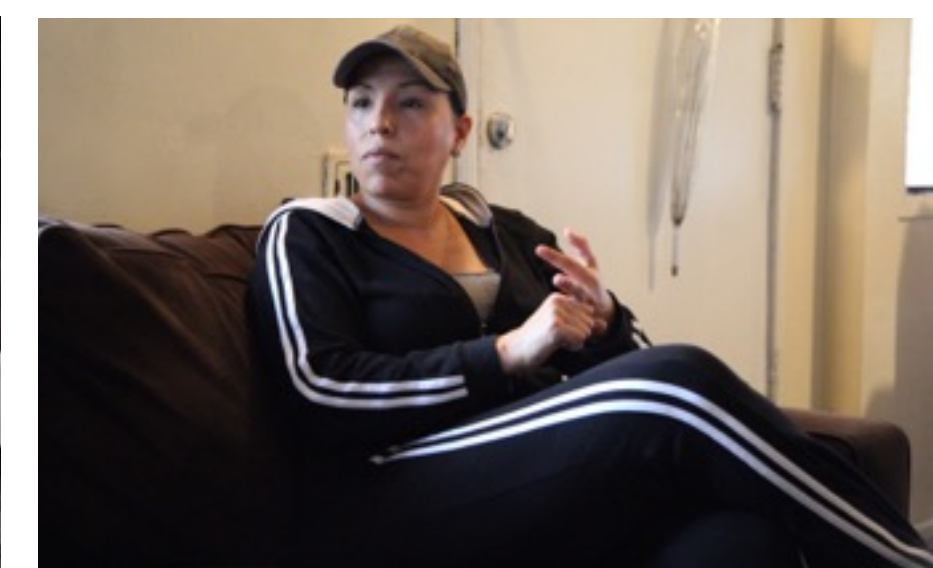
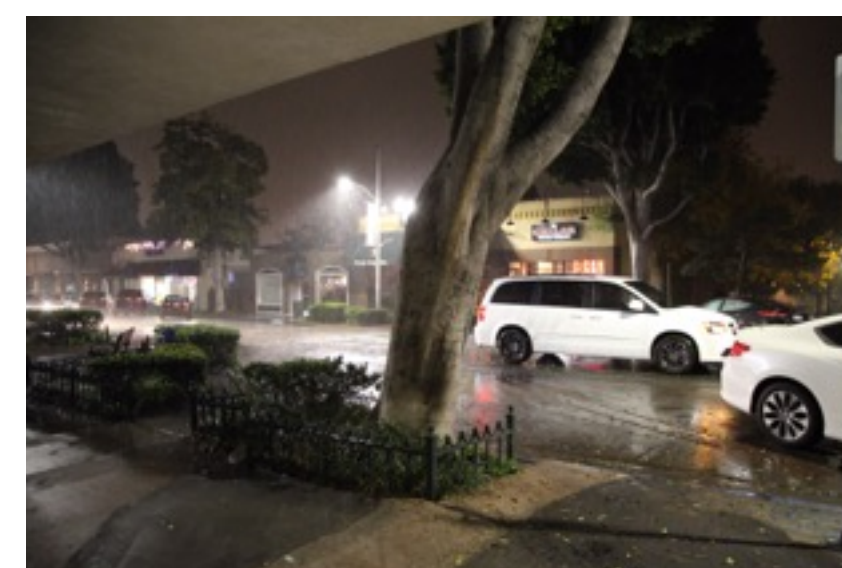
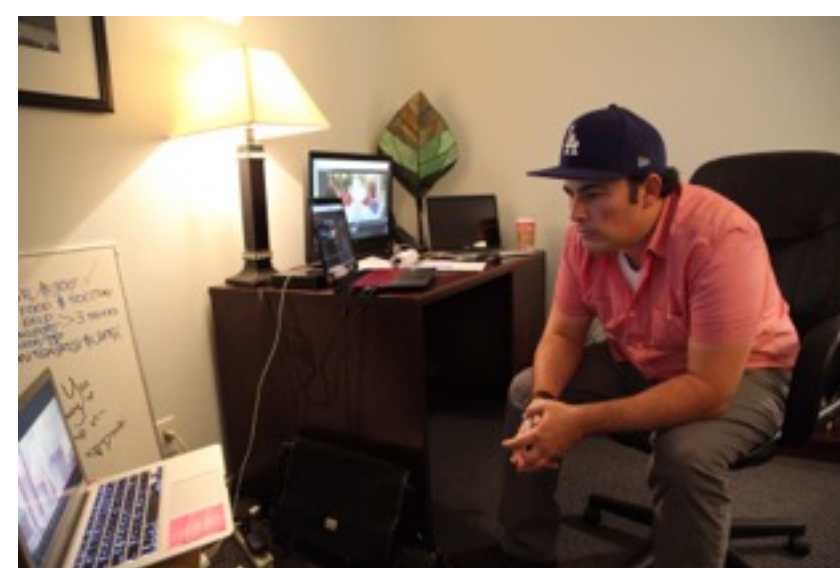
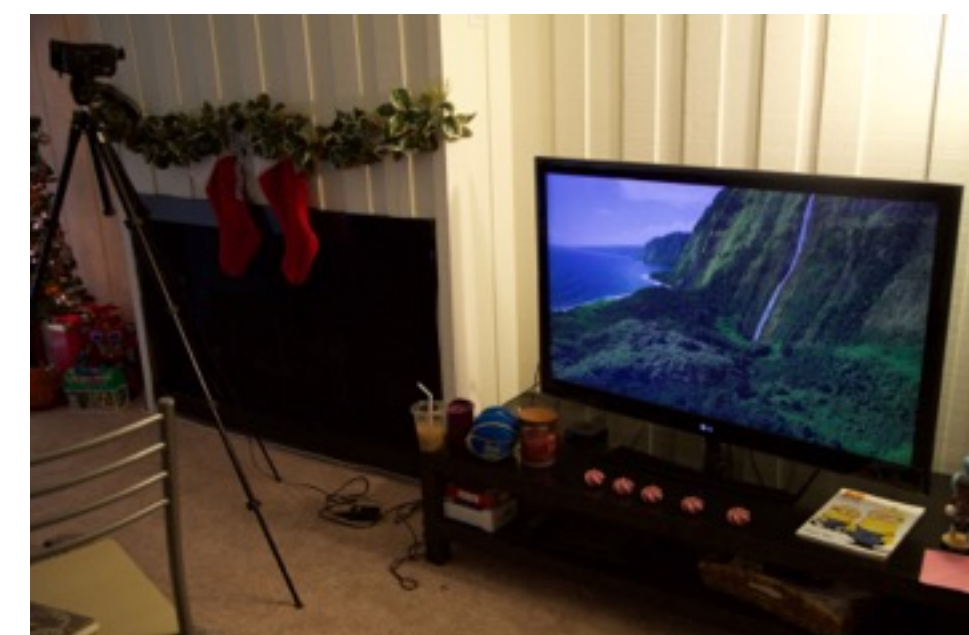
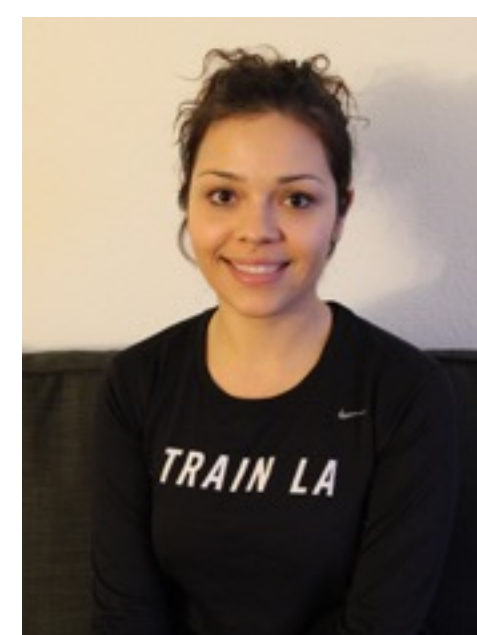
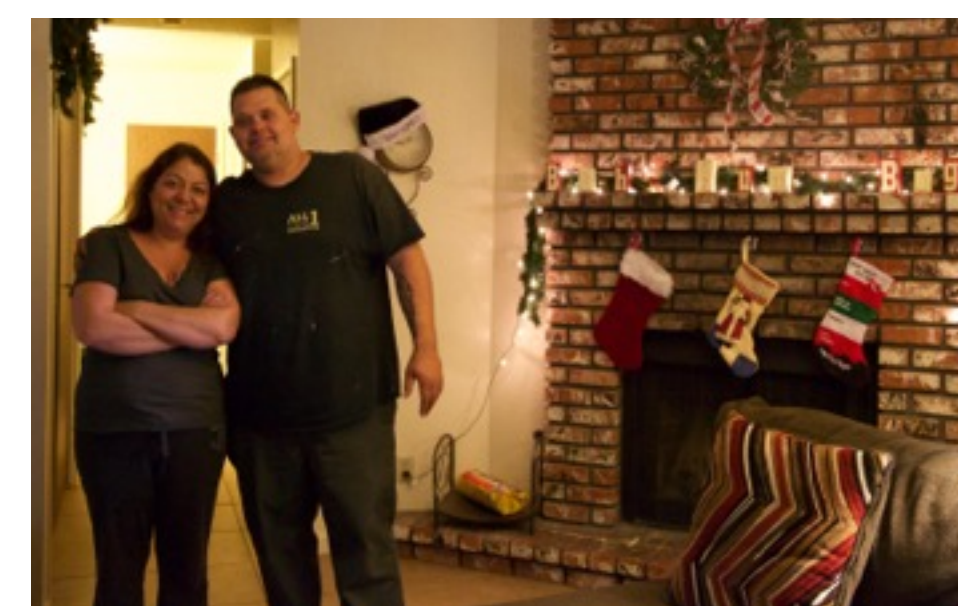
(Hint: This could be starting a new workout routine, a new diet, stopped smoking, carved out more time to read the newspaper, saved a little more money each month, etc.)



# Our Journey

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*We got to know many amazing Californians...*





# Our Journey

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*...and spent time in people's homes and businesses. **Listening. Understanding. Empathizing. Connecting** with real people to inform how we can forge meaningful connections with them.*



*Atticus Finch said, "You never really understand a person until you consider things from his point of view...until you climb into his skin and walk around in it."*

—  
*...rather than us talking more.*

*We prepared a reel so you can  
hear firsthand.*







# 3 Key Learnings

*First: Great News.*

## *Power of One is a powerful platform*

The principle “every ONE’s small actions can add up to BIG impact” is universally understood and believed. But it’s a new concept applied to energy — emphasizing we’re all in this together!

*“One change that I can do could impact the state if millions of others are doing the same thing.”*

*It works on individual, communal level.*

## *Power of Many reveals YOU aren’t alone.*

When people discover there are MANY like them they are re-energized. It keeps them going because, then, they believe: together, we can do this!

*I’ve felt isolated — like I’m the only one who cares. It’s so good to know there are others like me out there.*

*But there is work to do that will require collaborative effort...*

## *Power of Impact: The how makes people go wow.*

When people realize their contribution is making an impact on the state: “It’s working” they’re motivated to do more! But they need to see and hear HOW it’s working.

What if I told you?

- That using energy at non-peak times helps the state use renewables first, without having to switch to fossil fuels.
- That California’s energy efficiency efforts thus far have enabled the state to build 30 fewer power plants.

*“Now THAT’S something. Why are you holding back? Why isn’t the state shouting that from the roof tops?”*

## Key Creative Implications

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Be **simple** yet **specific**.

Be **proactive** not restrictive.

Balance **personal** and **communal** impact.

Embrace California's great distinguisher: its **diversity**.

Make a not-top of mind category **cool** by injecting it into culture.

## ***Our Reality:***

Awareness is extremely low. State goals are largely unknown.

## ***Our Opportunity:***

Start an energy stewardship movement — only a trusted state entity can fuel.



*Our platform has long-term  
potential for sustained momentum*

*...perpetual incremental gain allows us to continue  
building the movement for the next five years and beyond*



*It can take generations to rewire people's conception of energy and to make energy stewardship second nature but the time to start is now. There's no time to waste.*

*In five years we can and will invite Californians to come together, rally around a shared mission and shift perceptions of energy from something that is taken for granted to something the majority believe is important and must be managed efficiently.*

*“Change only happens when ordinary people get involved and they get engaged and they come together to demand it”*

*— President Barack Obama*

# Research revealed how we might activate different groups:

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## *Energize the Base*

These are the 68% of people who feel they are already doing all they can. We need to assure them they are not alone; they are one of many who all want to ensure California paves the way toward more energy efficient future.

## *Energize the Skeptics*

There's an opportunity to expand our influence. Even those who are inactive are hungry to know the consequences of their efforts. What's in it for them? How can we make EUC's energy movement relevant in their lives? We must provide the tools (and the specific facts) needed to overcome their skepticism and them to join in.

## *Enlighten the Youth*

Habits are formed early. Incredibly, adults still harken back to their Mom/Dad teaching them the lesson to "turn off the lights." We need to enlighten and train Generation Z so managing energy is second nature and being energy efficient is part of this cohort's identity.

## *Enrage the Rebels*

Tap into those who are frustrated by waste and want to take control, "flip off" those blocking national agenda saying climate change is a hoax. How could we create an EUC, mission oriented coalition (with utilities) toward a broader state purpose that everyone can trust and rally behind?



*Our anthemic launch work will achieve this and this.*

# *Quantitative Research*

# Audience Segmentation

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*5,000 respondents (reflective of CA demographics)*

Segmentation will allow us to:

- Determine targets that we can impact the most based on their mindsets, needs and behaviors
- Inform motivations for each segment
- Identify current behaviors and how they differ among segments
- Outline profile segments in depth that will inform media planning and purchases
- Lay foundational for benchmarking success of campaign over time



# The Process Underway

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*Step 1* → *Step 2* → *Step 3* → *Step 4* → *Step 5*

*Prepare Inputs*

Define the metrics that will determine your segments and refine them based on their predictive value to strengthen the overall analysis.

*Create Segments*

Evaluate a range of input combinations and clustering methods against specific criteria to develop the ‘optimal’ segment solution.

*Determine Value*

Project and prioritize segments based on potential to your organization.

*Identify Opportunity*

Uncover important, relative strengths, vulnerabilities and opportunities for your organization among priority segments.

*Bring to Life*

Develop vibrant, in-depth profile of each segment to understand where similarities lie and what makes each unique and meaningful.

# Next Steps

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- **Week of January 9th** — Field Study

4 Weeks in Market

- **Week of February 13th** — Analysis
- **Week of February 20th** — Final Report & Findings

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*Lunch*



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# *Five Year ME&O Plan*

- Vision Language
- SW ME&O Objectives
- The Program
- Tactics

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# *Simplifying the Language of the SW ME&O Vision*

The simplified language for vision will serve as the guiding star for the SW ME&O campaign, driving all the objectives, communications and deliverables that will flow out of the five-year plan. The umbrella vision for the program aims to make:

*Every Californian is an active energy steward.*



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# *Building a Movement*

The Responsible party is committed to creating and executing a SW ME&O campaign that will be more than just a marketing campaign. It will be a groundswell movement empowering Californians to take ownership of their energy-management behavior and consumption.

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# *The Objectives*

The Responsible party believes the stated objectives, through which campaign success will be measured, offer a clear, action-focused path for all Californians to become energy stewards.

## Vision

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*“All Californians will be engaged as partners in the state’s energy efficiency, demand-side management and clean energy efforts by becoming fully informed of the importance of energy efficiency and their opportunities to act. Statewide marketing, education and outreach should serve as a lead generator for local and regional programs and drive consumers to directly take actions to reduce or manage energy use in other ways.”*



## Vision: Internal Marketing Interpretation

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*Every Californian is an active energy steward.*

# Program Objectives

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1. Use EUC to educate consumers about Home Upgrade program, why energy use matters, how CA homes and businesses use energy, and EE, DR, DG and energy management actions available to them
2. Encourage consumers to engage with resources and tools to learn more about their energy use
3. Inform consumers about benefits of participating in local program opportunities, seasonal opportunities, and no or low cost actions
4. Provide direction about how consumers can learn more about and enroll in local program opportunities
5. Identify and pilot messaging and message delivery for partners that complements existing utility partnerships, including local governments, CBOs, retailers and realtors
6. Identify and pilot methods to provide info to small business owners
7. Use behavior research to develop a social marketing campaign
8. Coordinate local, regional and statewide marketing efforts, messaging, and tactics.
9. Develop an EM&V roadmap

# Objectives: Internal Marketing Interpretation



*1. Raise*  
awareness of  
California's  
success and the  
importance of  
continued energy  
management.

*2. Motivate*  
people;  
encourage every  
Californian to  
get onboard with  
the energy  
movement.

*3. Educate*  
people about how  
they can become  
better energy  
stewards; ensure  
they understand  
how they can  
take action.

*4. Drive Action;*  
convince people  
to do make  
energy-efficient  
purchases,  
participate in PA  
programs, and  
above all, become  
more active and  
better energy  
managers.

*5. Advocate* for  
the movement  
by amplifying  
the positive  
sentiment and  
actions of the  
program.



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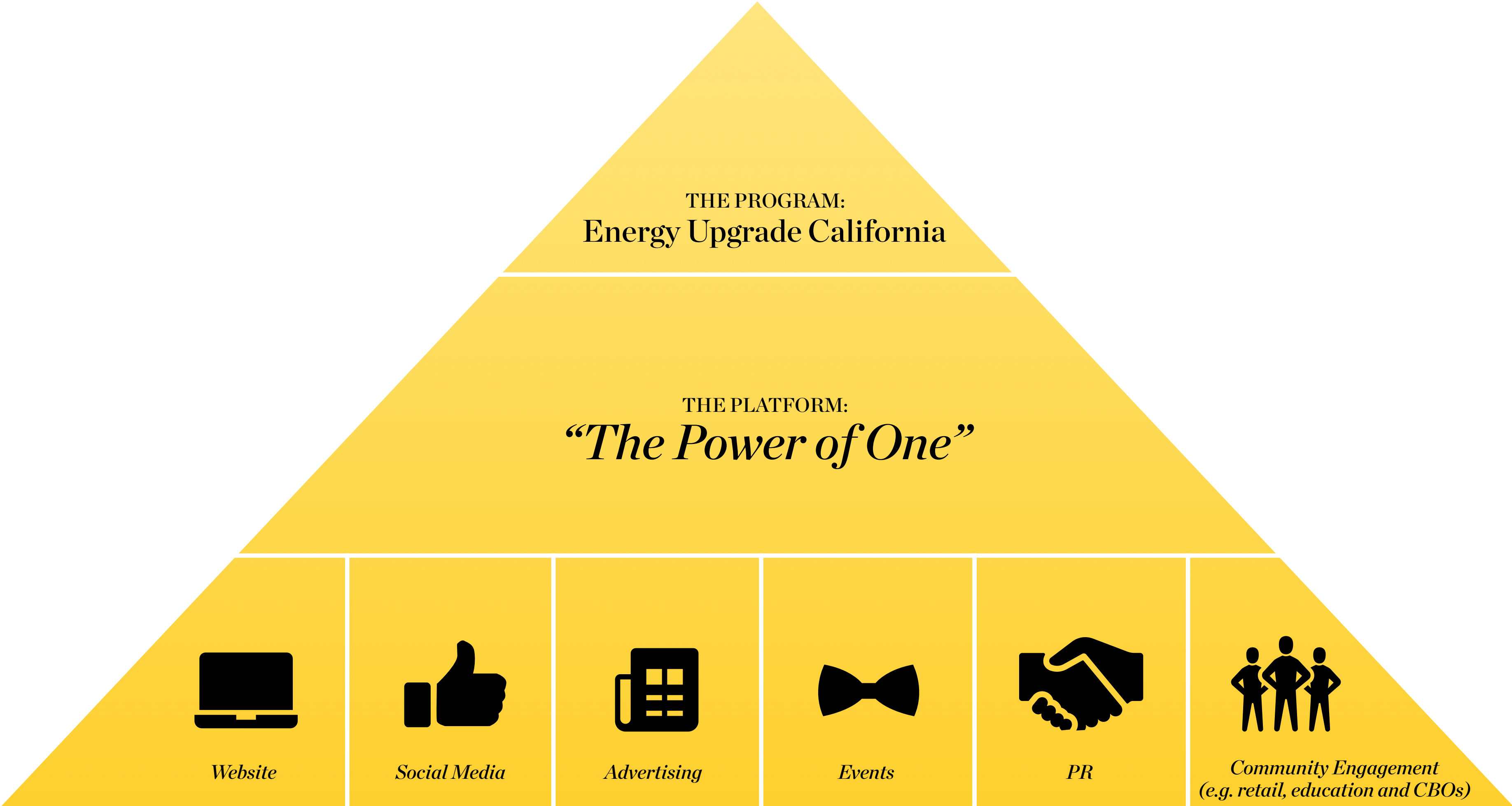
# *Strategic Roll-out*

It will be known: Energy Upgrade California is the brand powering this energy movement – pushing it forward, championing energy efficiency across the state. Not only will the brand be amplified through marketing and advertising efforts, it will be strengthened through engagements and strategic partnerships, appropriate for each target audience.

# *Building Brand*

# Brand & Communication Architecture

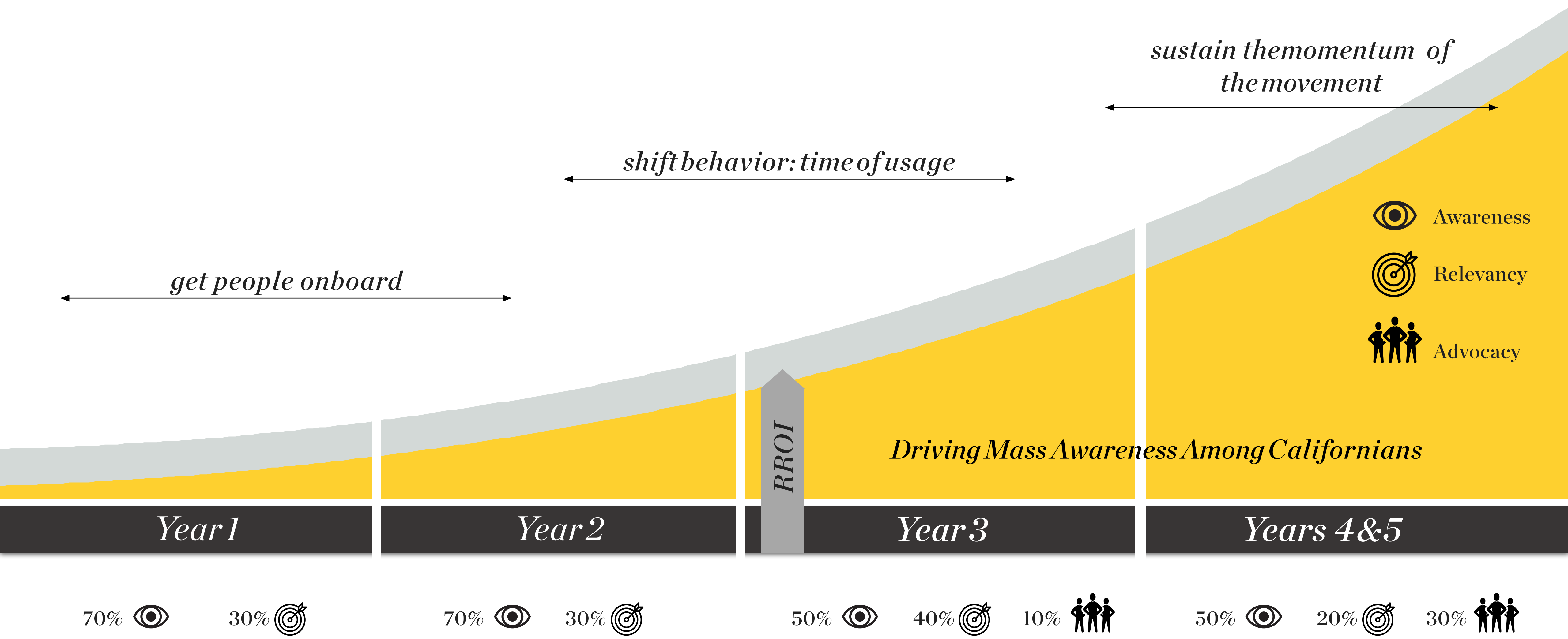
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*SW ME&O Channels and Campaigns*



# Building a groundswell *movement* overtime.



**SUPER BRIEF**  
*for EUC's* Integrated  
Launch Campaign

*GET:*

**All Adult Californians**

*TO:*

**Get onboard  
with EUC's  
energy  
movement**

*BY:*

**Taking their  
energy efficiency  
and energy  
management  
behaviors up a  
notch.**

*BECAUSE:*



**EUC believes:  
every Californian has  
the power to make a  
meaningful difference  
– start by doing ONE  
more thing!**

# Media Approach



## Illustrative Tactics

### Years 1&2 *Build*

- 70%  • Broad reaching media channels
- High impact media placements
- 30%  • Media partnerships
- Tent pole events
- Contextually targeted media
- Cross device
- Native content
- Efficient frequency channels

### Year 3 *Take Action*

- 50%  • Broad reaching media
- 40%  • Media partnerships
- Merge creative canvases
- Retargeting and sequential messaging
- Repeated exposure
- Targeted media
- 10%  • Strong call to action
- Influencers
- Social

### Year 4 & 5 *Advocate*

- 50%  • Broad reaching media
- 20%  • Media partnerships and event activations
- Retargeting and sequential messaging
- Test unique ad types
- 30%  • Influencers
- Strong call to actions



# *Brand Engagement*

# Engagements

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**Educating Californians to engage in best practices around energy efficiency starting at the local, grassroots level to support overall behavioral change and providing pathways to facilitate behavior change. The campaign will track “energy smart” purchases.**

- Energy Management Programs, Products and Services. Familiarization with **energy smart products**/services/programs to achieve personal energy efficiency/management practices
- IOUS/RENS/CCAs. Understand and **develop relationships with local energy provider**, which offers opportunities and energy-efficiency/management programs
- Coalition Development. Create an active and **engaged coalition of influencers and active EUC supporters** under the new brand that will engage in short- and long-term advocacy around energy-efficiency issues. The campaign tracks their activities and the efforts they make to build support
- CBO Collaboration. Implement engagement opportunities with CBOs to reach **hard-to-reach communities**

**Educating and empowering small businesses across California to promote energy-efficient practices, products and programs to build stronger engagements with Californians, long-term adoption of the Energy Upgrade CA brand methodology.**

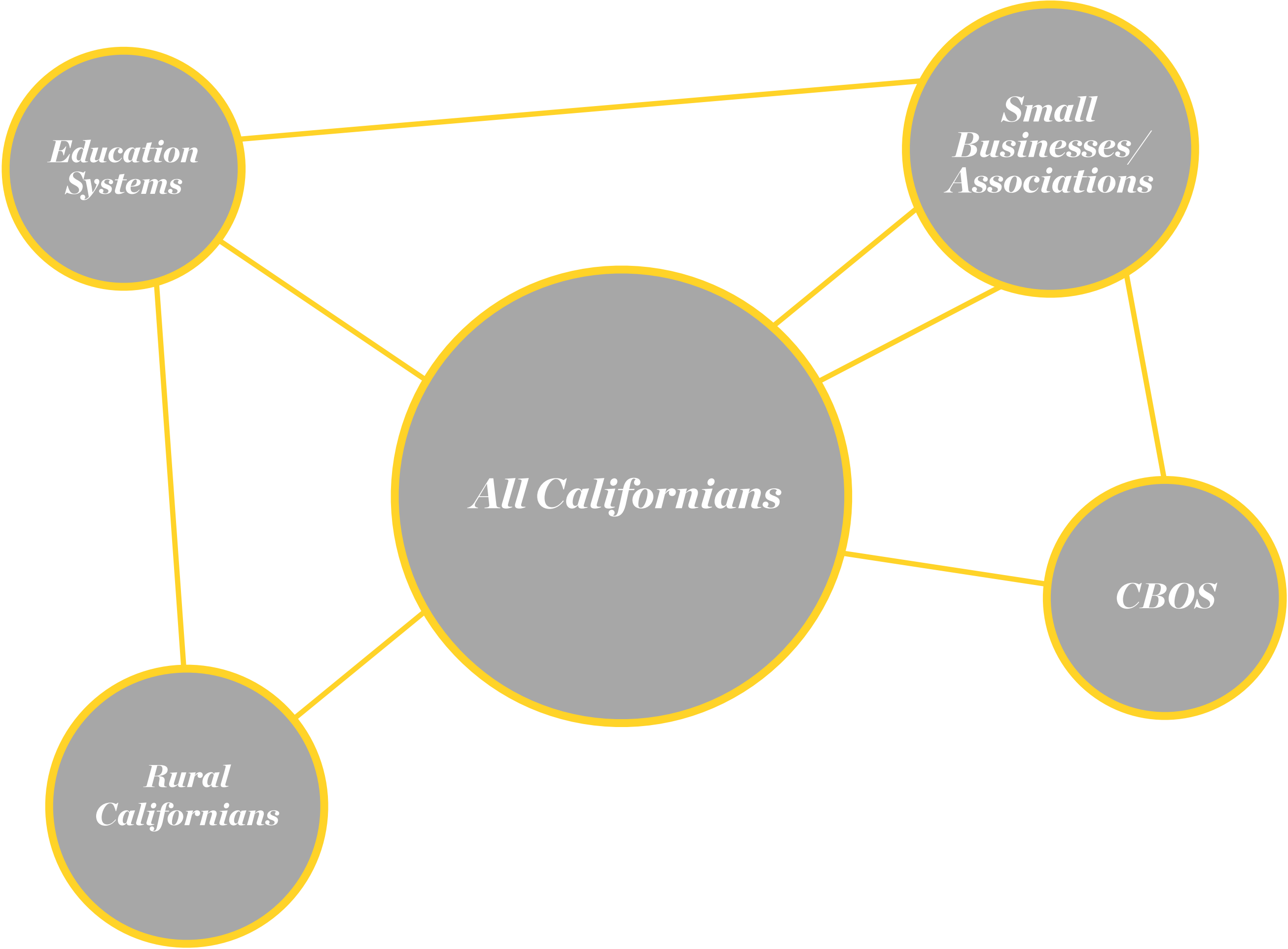
- Energy Management Products, Programs and Services. Become advocates for the energy-efficiency/management tools available to Californians via EUC or their local energy provider
- IOUs/RENS/CCAs. Understand opportunities to work together to encourage energy-smart behaviors(including, but not limited to, purchasing behaviors)
- Larger Population of Energy Stewards/Evangelists. Leveraging the larger network of Californians and organizations dedicated to make California become more energy efficient who will champion the Energy Upgrade CA brand and encourage others to participate

# *Strategic Partnerships*



# Strategic Partnerships

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# *Communication Plan & Measurement*

# Communication Plan & Measurement

<i>Objectives</i>	<i>Role ofTactic</i>	<i>Potential Tactics</i>	<i>Measurable Goal</i>	<i>Potential Messaging</i>
Awareness	Broad-reaching. Mass awarness and contextually relevant	Video (TV, Digital), OOH, Search, Social	e.g., X% increase of Aided/unaided Awareness of EUC/Messaging Awareness	"Power of One"
Motivation	Provide reasons "Why should people act?"	Social, Digital (display, video), Search, Social	e.g., X% of Californians with Intent to take action	Reasons to Act
Educate	Help people understand "how to act"	Website CBO Social, Print, Rich Media, Search, PR.	e.g., X% Increase level of energy awareness options.	Ways to act and/or Take Action
Participate & Encourage	Lead Generation	Video (TV, Digital), OOH, Search, Social	e.g., X% of Californians with Claimed Behavior actions, X Number of Leads to PAs, X Number of Redemptions	Act Now
Advocate	Amplify or Energize Sentiment and Action	Social, Search, Influence PR	e.g., X Number of Engagement	Join Us



## Next Steps on Metrics

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- Goals and metrics setting to be determined by outcome of benchmarking research
- Once determined and agreed these will be added to the Five Year Roadmap

# *Working Together*

# Working Together

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## *Steps for Working Together*

### *Conducting Briefings*

As the campaign gets underway, DDB will brief Consulted parties on campaign progress, such as implementation of the campaign launch, opportunities to collaborate on community outreach or public relations efforts, and key audience segmentation findings. The intent of these briefings will be more frequent in the initial stages, and become less frequent once the campaign has become more established.

### *Reporting*

DDB will maintain a frequent dialogue (such as quarterly in-person meetings) with Consulted parties, communicating important updates and milestones among all parties will ensure consistency and transparency throughout the planning and implementation process.

### *Optimizing*

DDB will continually be improving the SW ME&O campaign, based on lessons learned, feedback and campaign success. The Consulted parties will provide valuable insight into how the campaign is performing and how DDB and IOUs, RENs and CCAs can complement each other to achieve success in both the SW ME&O and regional ME&O campaigns.

\* DDB and the Consulted parties will further collaborate securely and privately through the use of a digital enterprise tool (to be selected). In the short-term, DDB will continue to share campaign materials and resources via a sharing tool, Box.

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# *Five Year Plan – A Working Draft*

Why We are Here Today

How We Got Here

Research

Vision and Objectives

Evolution of the Program

Tactics



# Next Steps

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# Updated Timeline

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# Open Discussion

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# Thank you